

We will need to take some personal information in order to process this request.

Account number (for office use only):

Transfer your existing Lifetime ISA (LISA) to The Nottingham. **Please don't send any additional funds to your new Nottingham Building Society LISA until your transfer is complete, we'll confirm when that is.** Cash LISA transfers can take up to 30 working days.

Please email your signed and dated Lifetime ISA transfer authority form to us at: isas@thenottingham.com

Postal Address:
LISA Applications
Nottingham House
3 Fulforth Street
Nottingham
NG1 3DL

1. Information about you

Title: _____ First name: _____ Middle name: _____ Surname: _____

Date of birth: National Insurance number:

Permanent home address: _____

Postcode: _____

Contact phone number (inc. area code) _____

2. Information about the LISA you want to transfer

Name of existing LISA provider: _____

Existing LISA account number/roll number: Existing LISA sort code: - -

3. Transfer authority

To my existing LISA provider, please close and transfer all of my LISA

Please note that any amount representing subscriptions for the current tax year will also be transferred in full including interest and will be subject to the annual LISA subscription limit of £4,000.

I authorise Nottingham Building Society

- To hold my cash subscription, LISA investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
- To make on my behalf any claims to relief from tax in respect of LISA investments.

I authorise my current provider

- To transfer the money to my Nottingham Building Society Cash Lifetime ISA. Please make cheques payable to Nottingham Building Society re my name and Nottingham Building Society account number (as shown at the top of this form).
- To provide Nottingham Building Society with any information, written or non-written, concerning the LISA and to accept any instructions from them relating to the LISA being transferred.

Signed: _____ Date: (dd/mm/yyyy)